

T-SYSTEMS MULTIMEDIA SOLUTIONS

# GETTING STARTED

VERSION 3.1

DATE: 20.08.2014

**T · Systems ·**

**docu**life®

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# 1 Introduction

Welcome!

We're glad that you decided on doculife for your needs. doculife is designed to enable you to manage your files and documents in the cloud easily and intelligently.

This document will help get you started with doculife. Please note that the description refers to doculife Desktop Version 5.4.9!

As you go through this guide, you will be taken through the installation and activation process for doculifeDesktop and will learn how to create additional users and user accounts.

Once you are done with the initial steps in this document, you will be ready to use doculife efficiently and will be familiar with all available functions.

Section 5 of the doculifeDesktop user manual shows how to get started in the installed and activated application (e.g., how to create files, registers, and documents).

Details particular to the workflow used in doculifeSECplus will be identified by being preceded by the following word: **SECplus**

## 2 General security information

This section contains general security information concerning the use of doculife.

Make sure to read it carefully.

### 2.1 Anti-virus protection

doculife does not provide any additional anti-virus protection.

This means that documents and e-mails transferred to doculife will not be checked for malware in doculife.

Make sure to check all documents and e-mails for malicious code on the computer before storing them in doculife.

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**Attention! Risk of data loss**

Use an anti-virus product that monitors your data, e-mail, and Internet communications and protects your computer from attacks.

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### 2.2 Saving passwords

Due to security reasons, users have to enter their password every time they log in to their doculife account (i.e., connect to the system).

It is possible to configure the system in such a way that users will be able to save their password for a tenant.

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**Attention! Risk of misuse of data**

Saving login information can enable unauthorized users to access your data. Please make absolutely sure that saving login information is allowed by your company's security policies before doing so.

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### 2.3 Using mobile devices

Mobile devices are more vulnerable to malware and spyware attacks. Users are responsible for the security of their own devices.

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**Attention! Risk posed by unauthorized data mining and access**

Make sure to only load apps from trustworthy sources on your device. Use appropriate software designed to protect you from spyware and similar attacks.

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## 3 Installation

### 3.1 Installation packages

The following installation packages are available for doculife Desktop:

#### **doculife Desktop Suite**

Includes doculife Desktop with the Microsoft Office add-in and the components for scanning and for supporting multifunction devices.

#### **doculife Desktop Portable**

- Portable version of doculife Desktop without the Microsoft Office add-in and without scan integration
- Does not need to be installed, and can be used on external memory devices such as USB flash drives

### 3.2 Installation requirements

#### **Supported operating systems**

- 32-bit / 64-bit Windows 8 Pro
- 32-bit / 64-bit Windows 7
- Windows Vista
- Windows XP Professional

#### **Hardware system requirements**

A current PC with one of the operating systems listed above

#### **Supported Microsoft Office versions (doculifeDesktop Suite)**

Microsoft Office Professional 2003/2007/2010/2013

#### **Requirements (doculife Desktop Suite)**

The following components are required for the doculifeDesktop Suite:

- Microsoft .NET Framework 3.5
- Windows Installer 3.1
- Visual C++ Runtime Library (only if the scan option is installed (default))

If you do not have these components on the computer where the software will be installed, they will be installed automatically.

### 3.3 Desktop Suite

doculife Desktop is available as a convenient client that enables access to doculife.

It seamlessly integrates itself into Microsoft Outlook and provides direct access to the contents in doculife from Microsoft Office. This means that you, as a user, can simply continue to work with the applications with which you are already familiar while taking advantage of direct access to doculife.

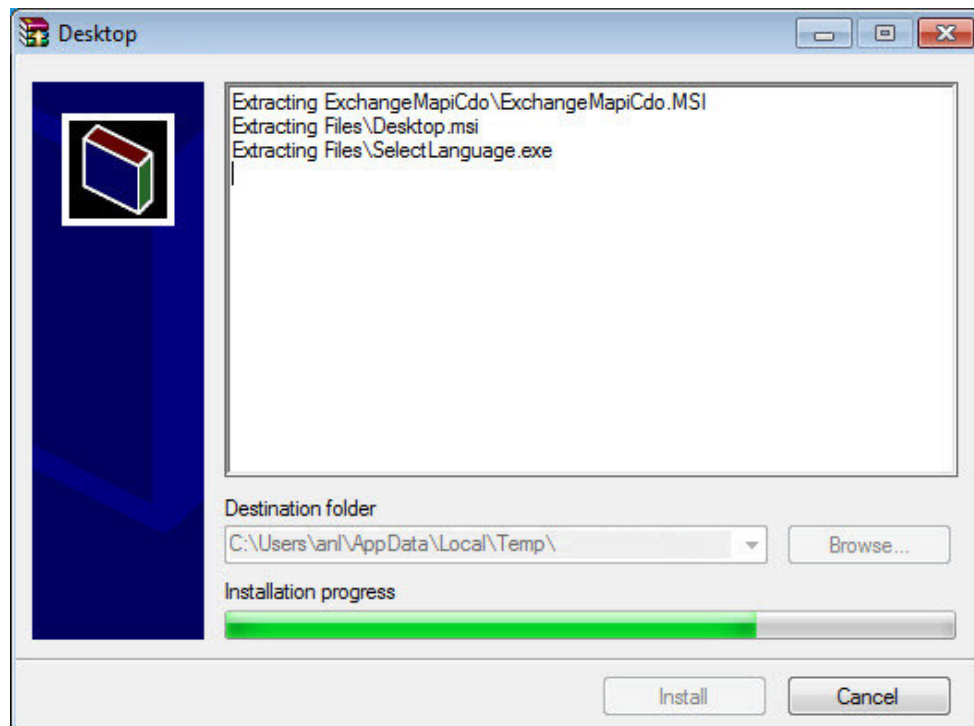
**Please note:**

To install the doculife Desktop Suite, you will need administrator rights on the computer where you will be installing it. If you do not have administrator rights for the computer, you can use “doculife Desktop Portable” instead.

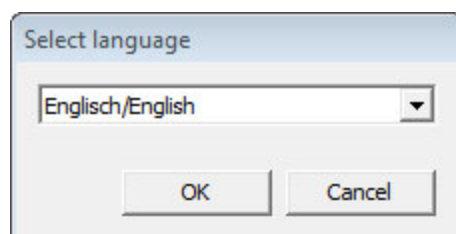
1. Run the executable file (doculife-Desktop-Suite-setup-5.x.x.exe) by double-clicking on it. The installation process will start automatically.

The setup files will be extracted.

You do not need to do anything at this point.

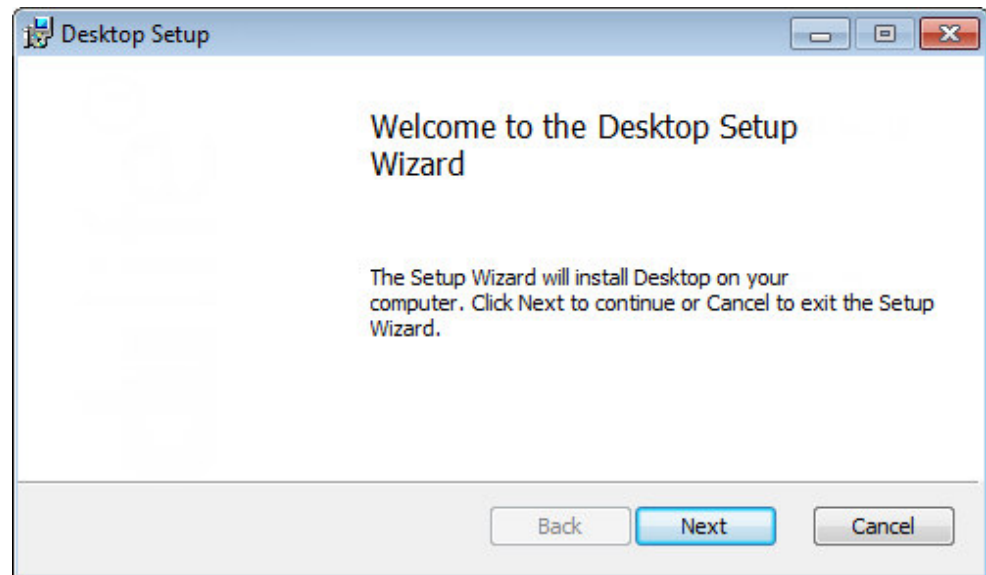


2. Select the language you want and click on **OK**.





3. A prompt will appear. Click on **Next**.

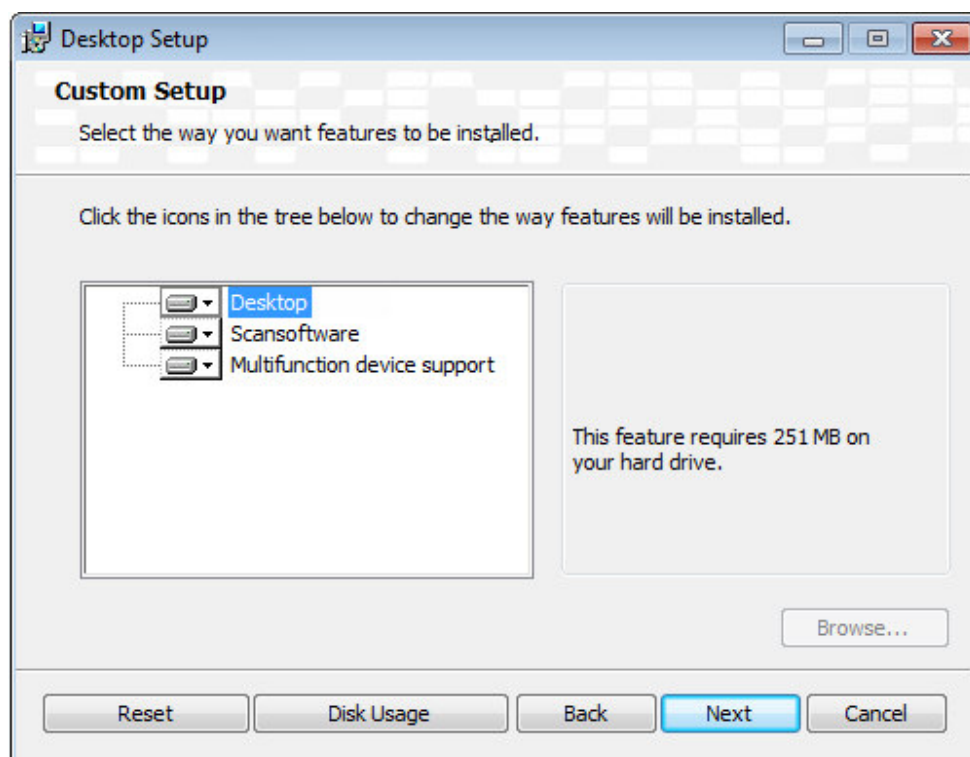


4. Accept the license agreement and click on **Next**.

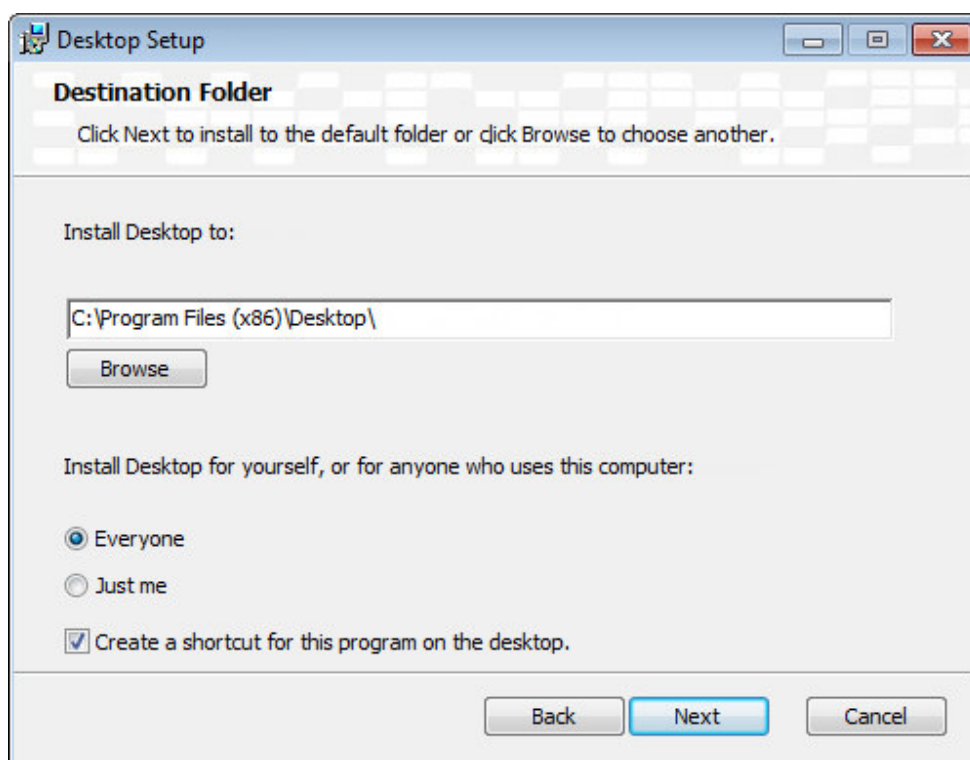




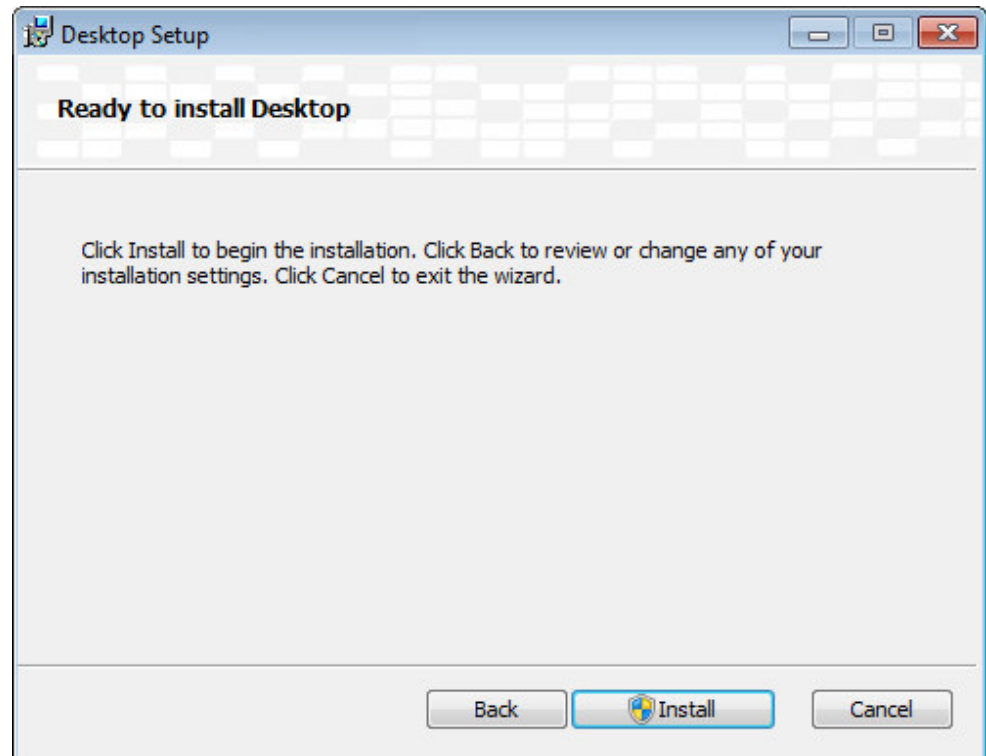
5. To do a full install (recommended), click on **Next**.



6. Select the installation path you want or confirm the default path (recommended) by clicking on **Next**.

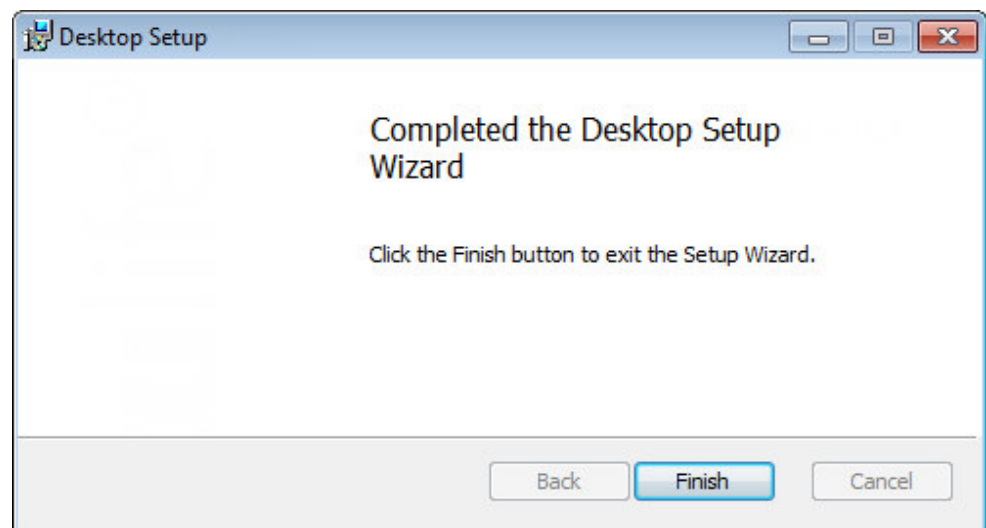


7. Click on **Install** to start the installation process.



doculife Desktop will be installed. This may take a few minutes.

8. Click on **Finish** to exit the setup wizard.



### 3.4 Desktop Portable

The Portable version does not need to be installed.

You will receive a ZIP file (doculife-Desktop-Portable-5.x.x.zip) that you will need to unzip to a directory before using the Portable version.

The doculife Desktop.exe executable file, which you can use to start Desktop Portable, will be located in the doculife Desktop Portable 5.x.x subfolder.

## 4 For administrators

### 4.1 Initial activation

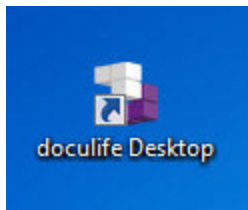
Before being able to use doculife for the first time, it needs to be activated. This initial activation is normally carried out by the administrator and is necessary in order to enable doculife to communicate with your tenant at the high-security data centre.

To activate the software, you will need an activation file (.iadc file) provided by the operator.

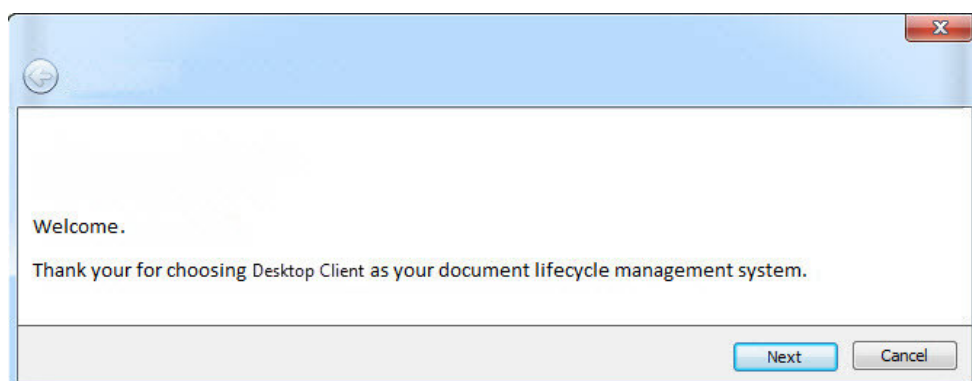
When the software is activated, you will have to change the administrator password.

**SECplus:** In the case of doculife SECplus, the key that can be used to lock and unlock the tenant must also be changed during the activation process.

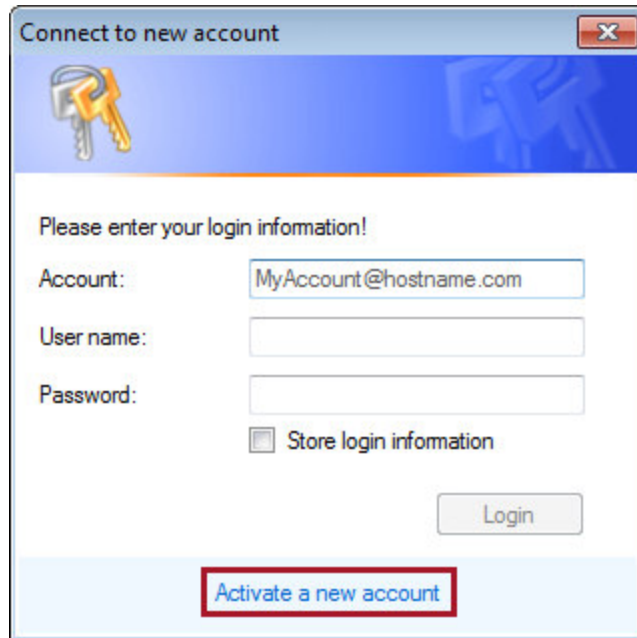
1. Double-click on the doculife icon on your desktop to start doculife Desktop.



2. A welcome prompt will appear. Click on **Next**.

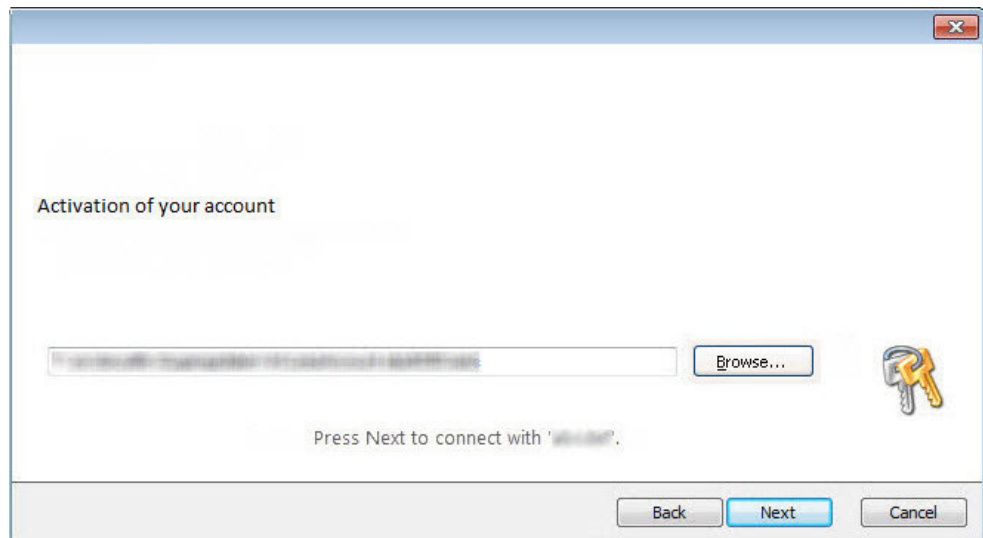


3. Click on **Activate a new account**.



The dialog box is titled "Connect to new account" and features a key icon. It prompts the user to "Please enter your login information!". It contains three input fields: "Account:" with the text "MyAccount@hostname.com", "User name:", and "Password:". Below the "Password:" field is a checkbox labeled "Store login information". A "Login" button is positioned to the right of the "Password:" field. At the bottom, a blue button labeled "Activate a new account" is highlighted with a red rectangle.


4. Click on **Browse...**, select the activation file (**.iadc file**), and then click on **Next**.



The dialog box is titled "Activation of your account". It contains a text field with a placeholder URL. To the right of the text field is a "Browse..." button. Below the text field, it says "Press Next to connect with 'Administrator'". At the bottom, there are three buttons: "Back", "Next" (highlighted in blue), and "Cancel". A key icon is located on the right side of the dialog box.

5. Set a password for the administrator.

Activation and unlock procedure of your account



**Account activation**

To activate your account a new administrative password must be set.

**Set a password for Administrator**

Password:

Repeat password:

Strong Password

☐ Show password characters

OK Cancel

**SECplus:** Set the key **and** the password for the administrator.

**(EN) Erstaktivierung Ihres Kontos**

Ihr Konto ist noch deaktiviert. Für die Aktivierung benötigen Sie einen Schlüssel, mit welchem Sie Ihr Konto zukünftig auf- und abschließen können, sowie ein Kennwort für den Administrator.

Schlüssel und Kennwort müssen den folgenden Richtlinien entsprechen:

- Der Schlüssel muss jeweils mindestens ein Zeichen aus den vier Zeichengruppen Großbuchstabe, Kleinbuchstabe, Zahl, Sonderzeichen enthalten und mindestens 10 Zeichen lang sein.
- Das Kennwort muss Zeichen aus mindestens drei der o.g. Gruppen enthalten und mindestens 8 Zeichen lang sein.

**Hinweis:** Sie können den Schlüssel und das Kennwort im nächsten Schritt als PDF-Datei speichern oder ausdrucken, um diese an einem sicheren Ort zu verwahren.

**Choose here a key to lock/unlock your account:**

Key:

Repeat key:

Strong Password

**Set a password for Administrator**

Password:

Repeat password:

Strong Password

☐ Show password characters

OK Cancel

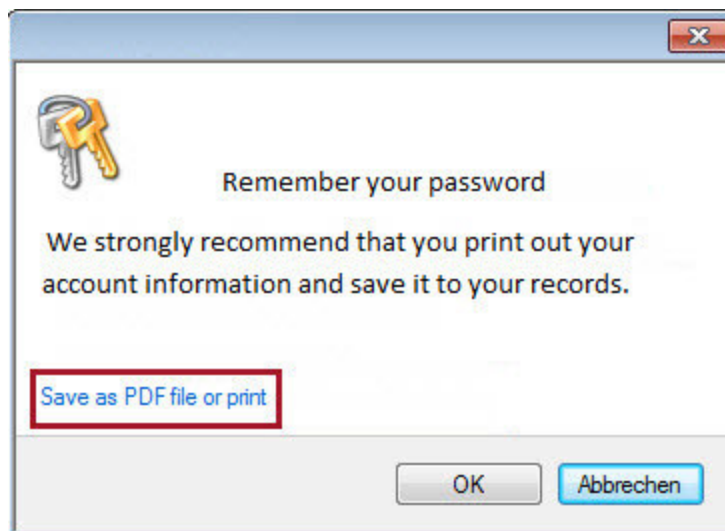
**Tip:**

You can have the program show the password/key characters on the monitor while you are entering them. This may come in handy, as the password/key will only be accepted if both password/key fields match.

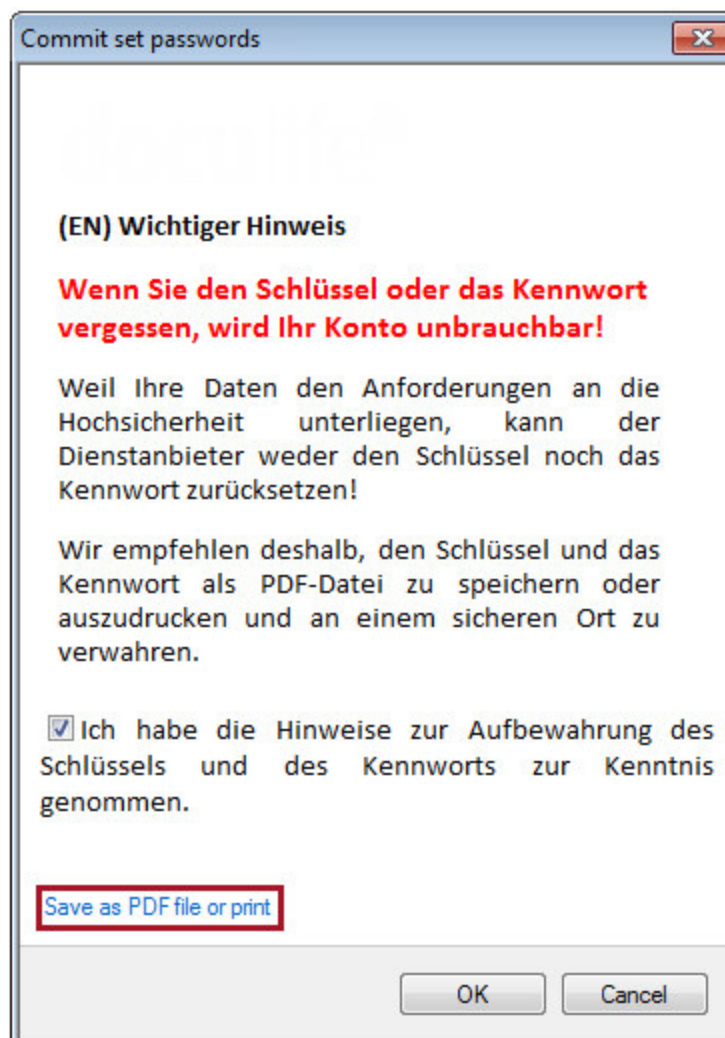
6. Confirm by clicking on **OK**.

The following dialog box will let you save the administrator's login information as a PDF file or print it if you want.

7. Click on **Save as PDF file or print**.



SECplus: Click on **Save as PDF file or print**.

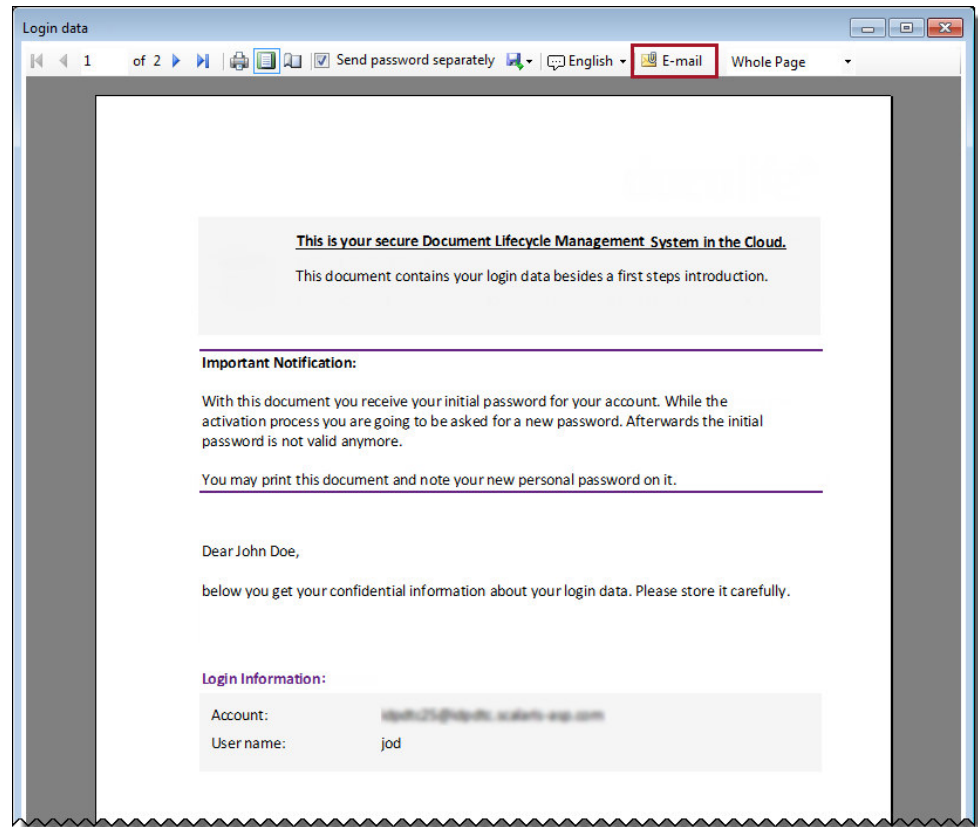




**Please note:**

Make sure to safely store your administrator password/your key. If you can do so, take this opportunity to print out the login information and store it in a safe place.

8. Print and/or save the login information, then close the window.

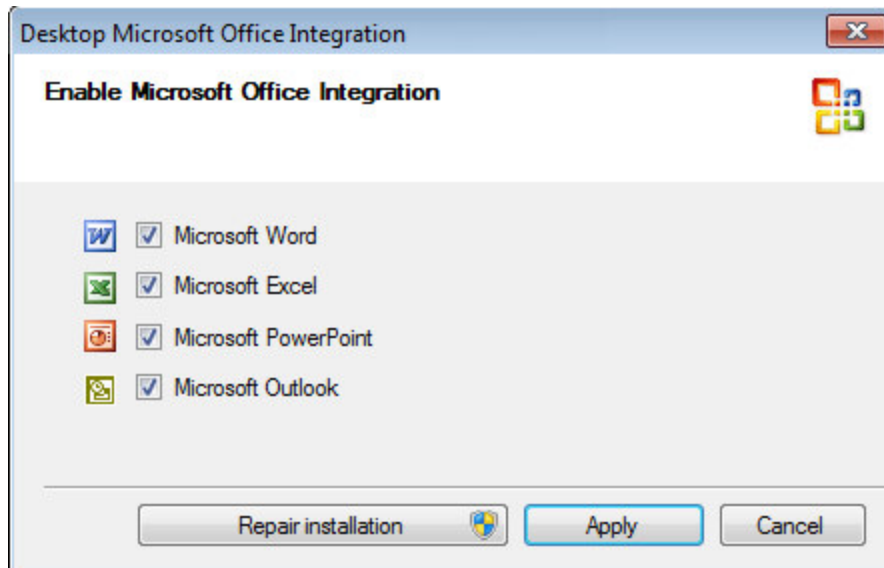


You will be taken back to the original dialog box.

9. Click on **OK**.

The software will be activated.

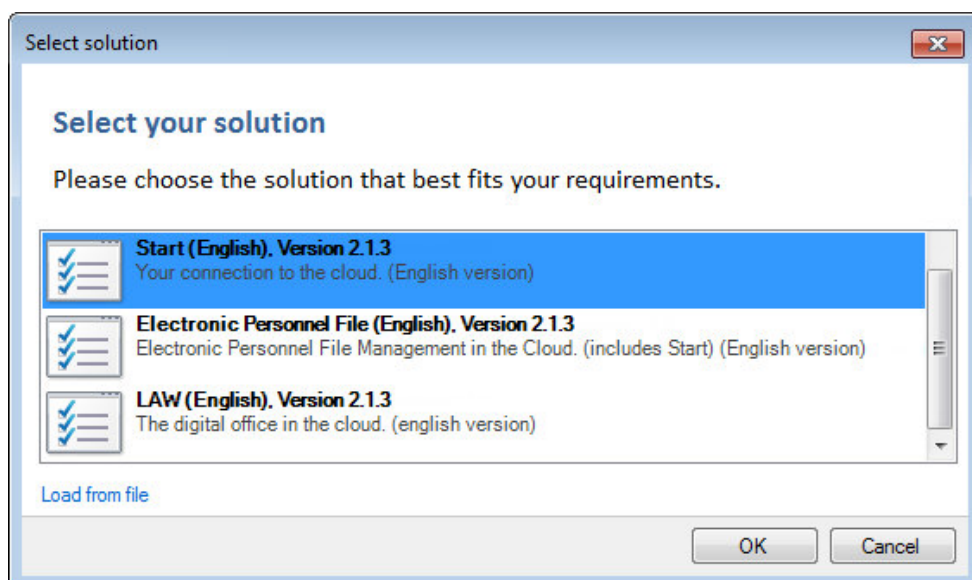
10. Enable/disable the various Office integration options as necessary and click on **Apply**.



doculife Desktop will be prepared.

11. Select the solution you need or select the doculife Start option.

If you have received a solution update from your solution vendor, click on **Load from file** and open the solution, which will be found in .zip format, in your filesystem.

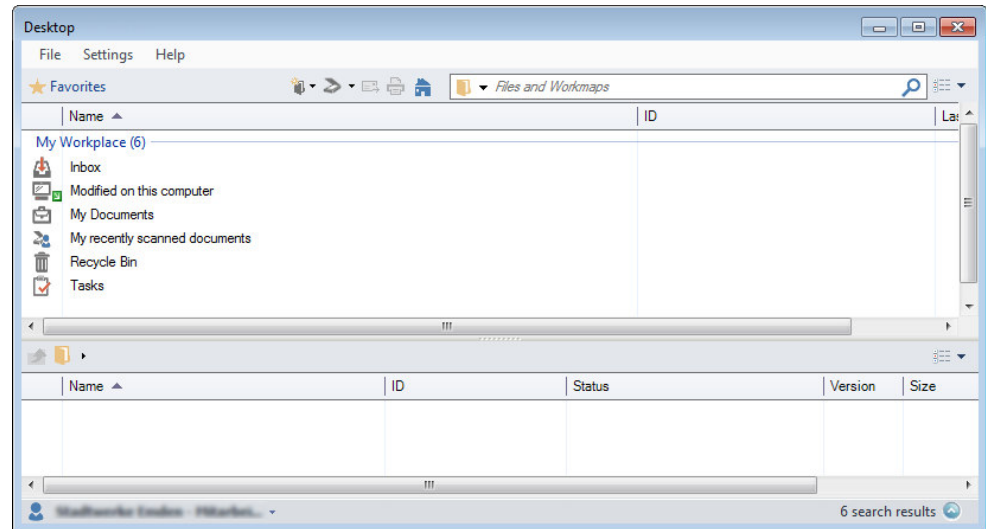


12. Click **OK**.

The account will be set up.

The system will establish a connection and communications between doculife Desktop and your tenant at the high-security data centre. In addition, all templates required for file and document types, as well as other settings, will be loaded. This may take a few minutes.

As soon as the loading process is completed, your doculife Desktop will appear. Once it does, you can start working.



## 4.2 Creating users

Once you activate the program, you can create additional users so that they can work with doculife.

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### Please note:

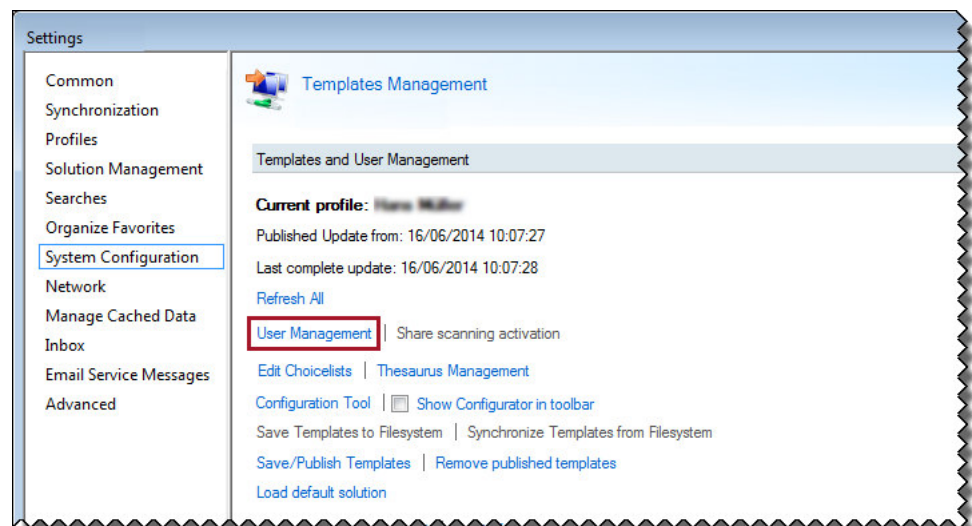
This function will only be available to users with administrator rights

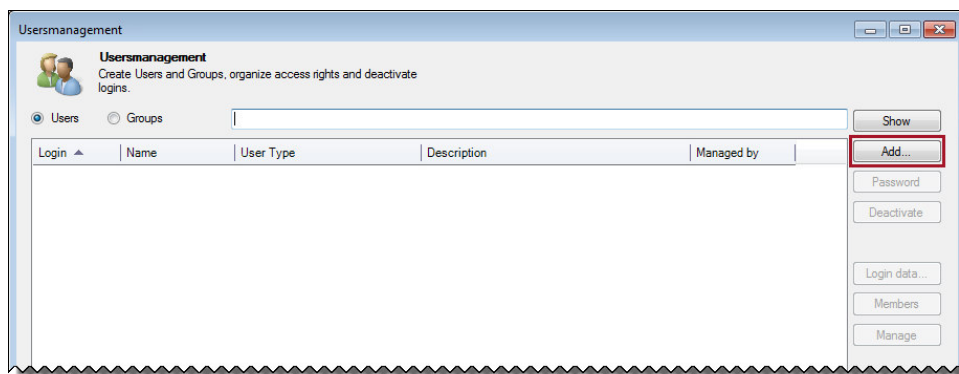
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1. In doculife Desktop, click on the **Settings** menu option.



2. Click on **System Configuration** and then on **User Management**.



3. Click on **Add...**4. Select a **User Type** (used for information purposes only) and enter a **Login**, **Name**, and **Password**.

Please make sure to read the information provided in **Guidelines of secure passwords** and to follow the corresponding recommendations.

If you want, you can enter a description of the user context.

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**Please note**

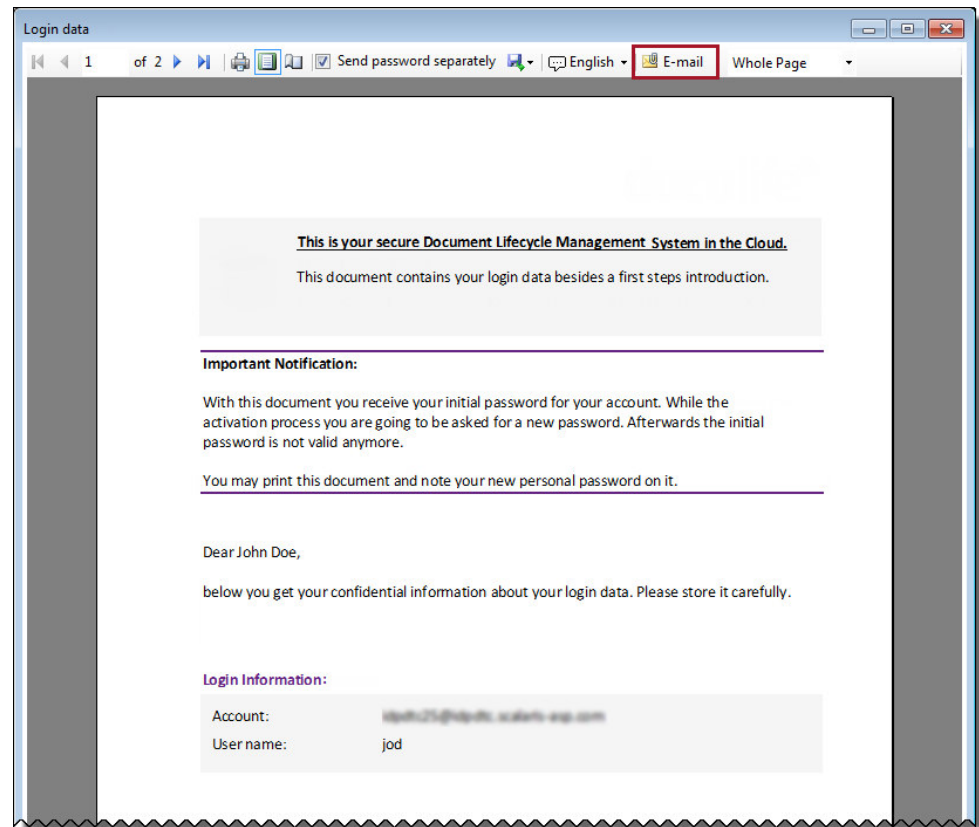
Enable the **Send login data to user** option. This way, you will get a PDF file with all the required information for the new user once you are done.

---

5. Click **OK**.

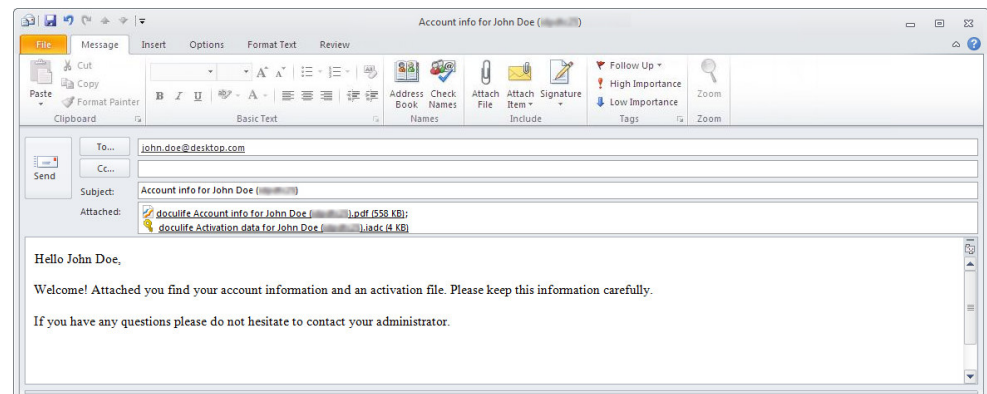
A PDF file with the user's login information will be shown.

6. Click on **E-mail** to send the user their login information together with their activation file (.iadc file).



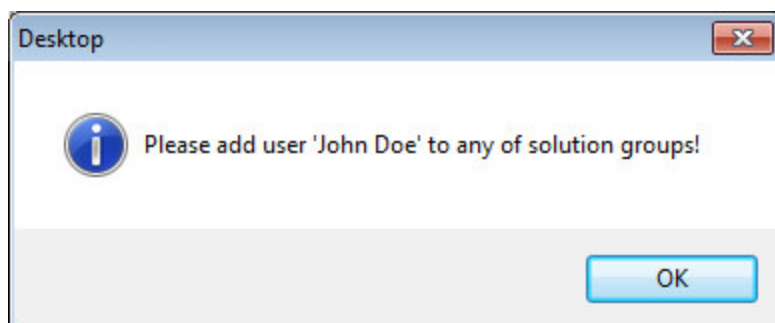
If you want to send the password in a separate e-mail due to security reasons, enable the **Send password separately** option.

The e-mail window will appear.



7. Click on **Send** and close the window with the login information.
8. Now you will need to add the new user to a user group so that the user will get the group's content access permissions.

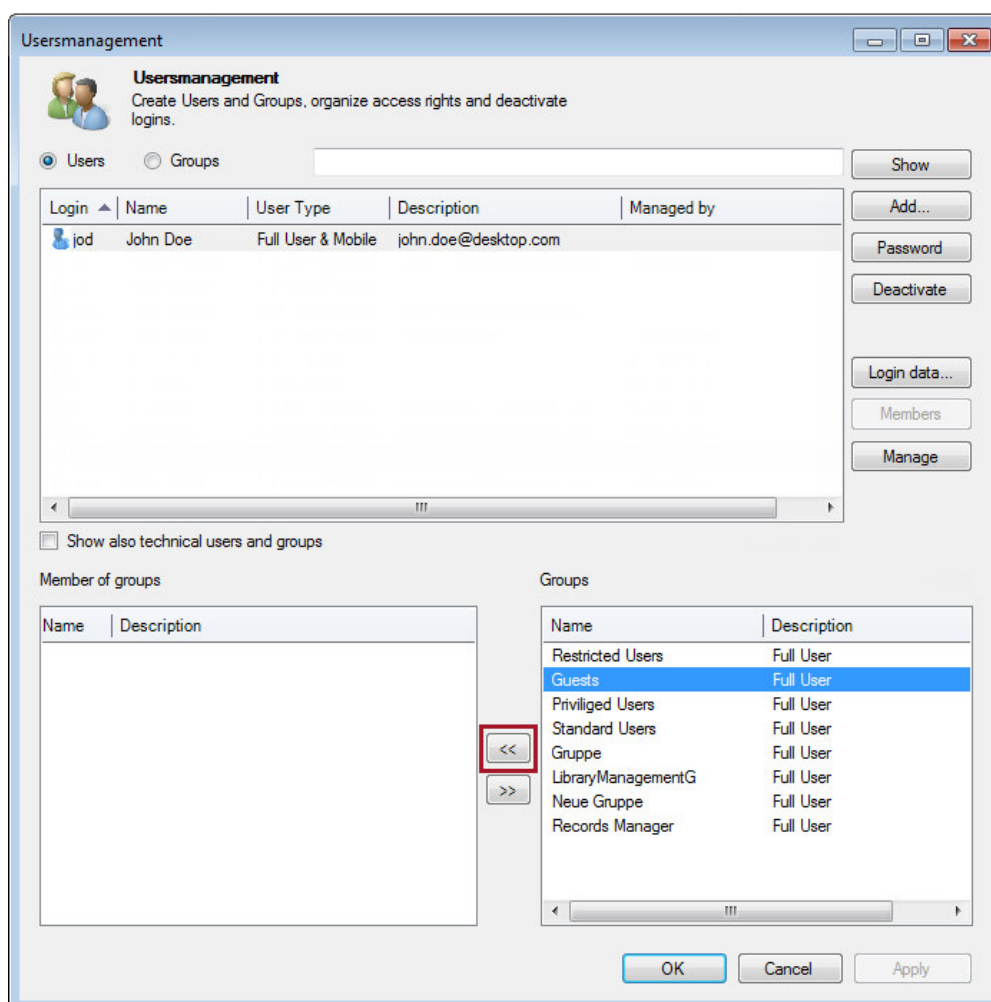
Click **OK** when the prompt below appears.



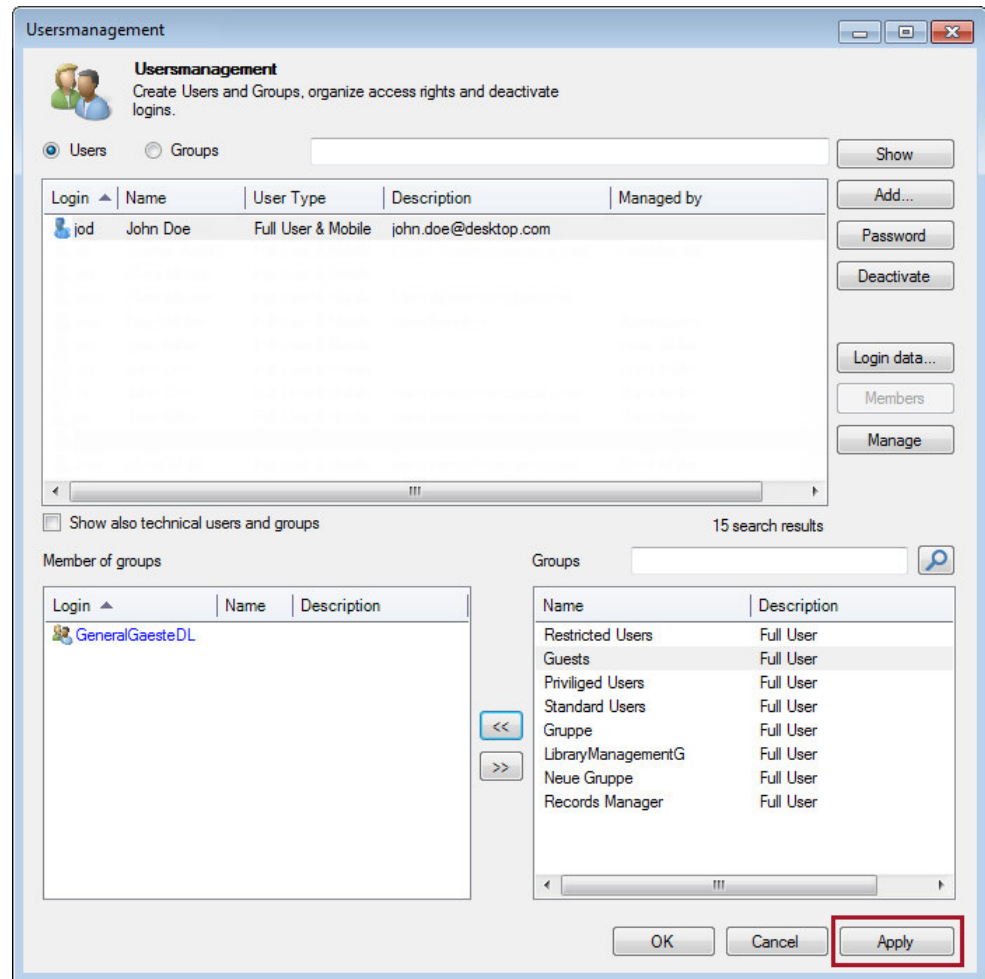
9. In the **Groups** pane, select the user group(s) to which you want to add the user. Then click on the left arrow icon to add the group to the **Member of groups** pane.

### Please note

The system will automatically assign technical groups. Do not add these groups manually. In order to ensure that you will not add a technical group by mistake, make sure to leave the **Show also technical users and groups** option disabled.



10. Click on **Apply**.



The changes you made will be saved.

11. Close the Usersmanagement window by clicking on **OK**.
12. Close the Settings window by clicking on **OK**.

You have now created a user.

### 4.3 Activating additional user accounts

In addition to your initial user account, you can also activate additional user accounts.

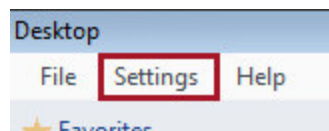
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#### Please note:

This function is relevant, for instance, to administrators who work with their personal user account in the business process, i.e., for their daily work (and limit themselves to using the administrator user account for administrative purposes only).

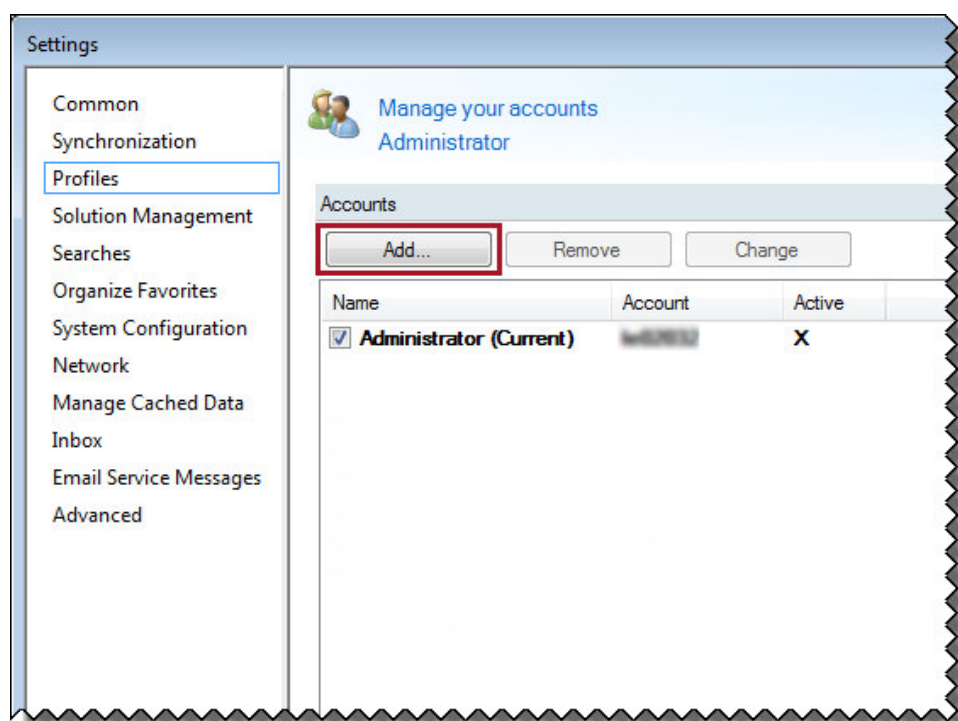
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1. In doculife Desktop click on the **Settings** menu option.

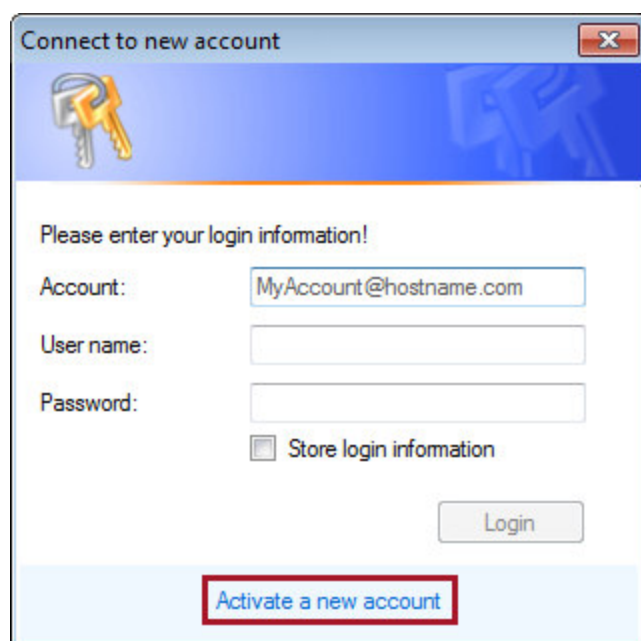




2. Click on **Profiles** and then on **Add...**

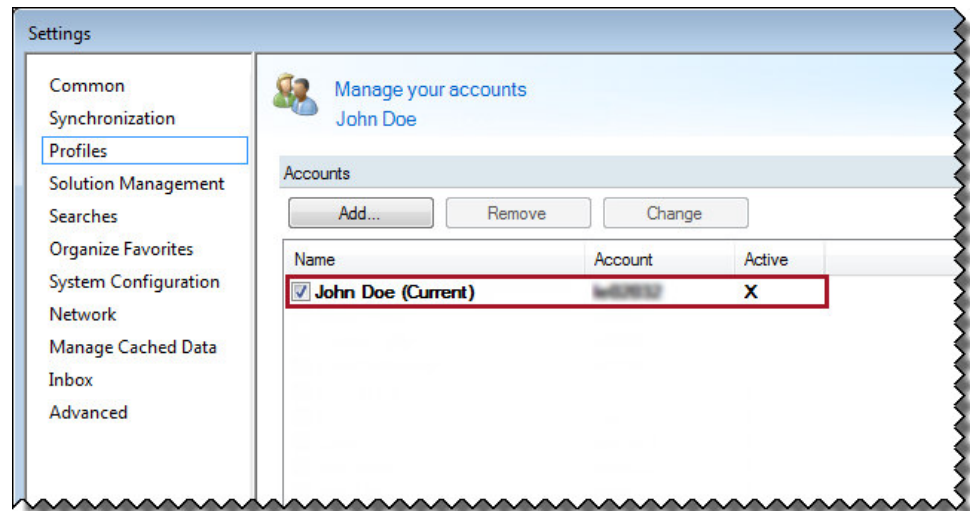


3. Click on **Activate a new account**.

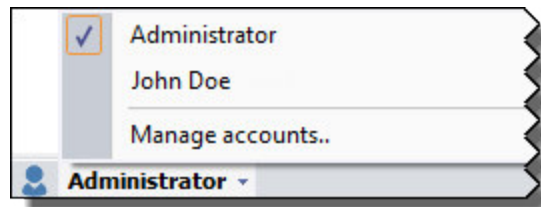


4. Select the activation file (.iadc file) for the new account.

The new account will be shown in the account overview together with the user account that you already had.



5. Close the Settings window by clicking on **OK**.
6. You can use the Desktop status bar to select the new user account and connect using it.



## 5 For users

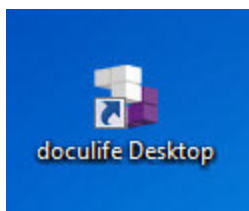
### 5.1 Activating your account

Before activating your account, you must have received your login information for doculife from the administrator. This information will consist of:

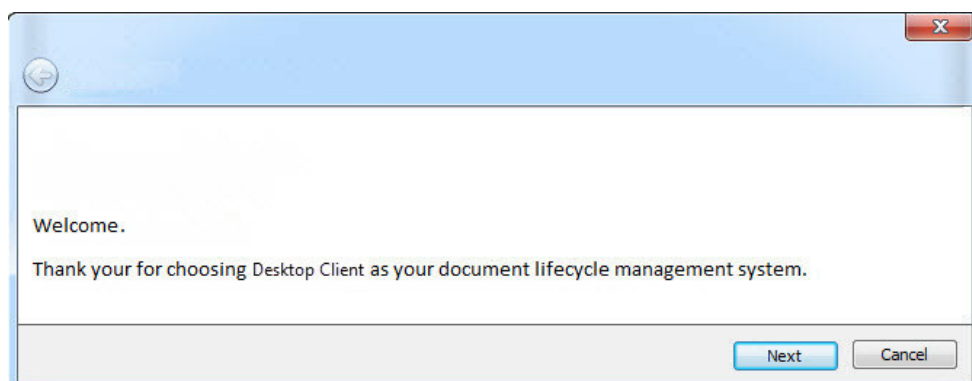
- An activation file (**.iadc file**)
- A PDF file with your account and username

Follow the steps below to activate your account and get access to the program.

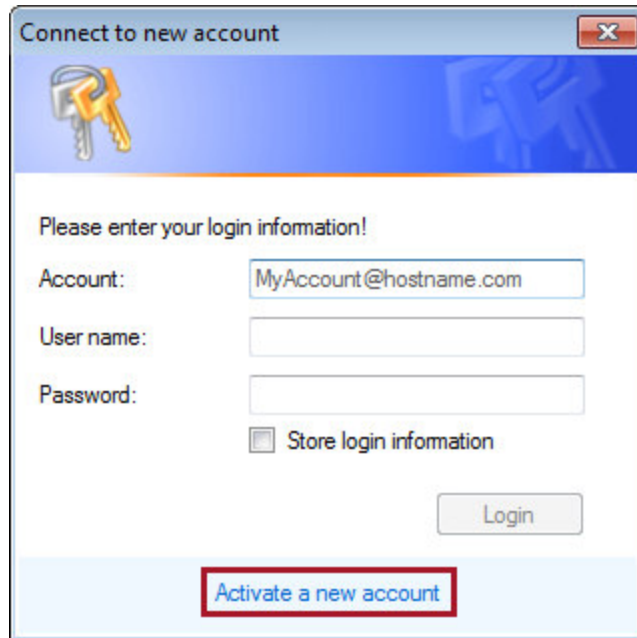
1. Double-click on the doculife icon on your desktop to start doculife Desktop.



2. A welcome prompt will appear. Click on **Next**.

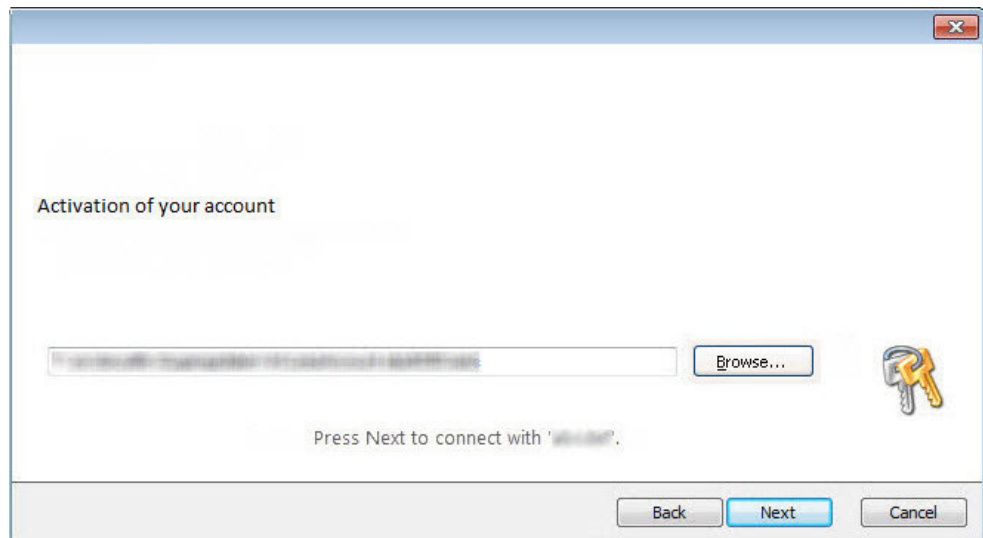


3. Click on **Activate a new account**.



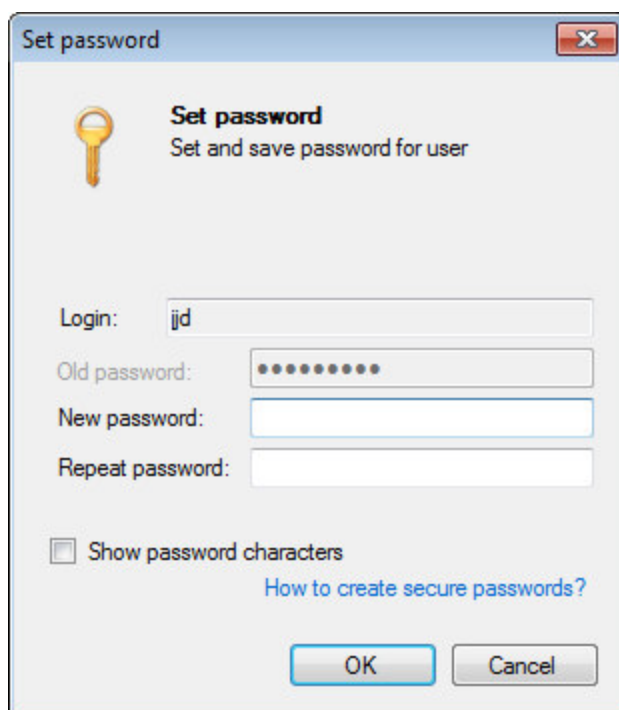
The screenshot shows a Windows-style dialog box titled "Connect to new account". It has a blue header bar with a key icon. Below the header, it says "Please enter your login information!". There are three input fields: "Account:" with the text "MyAccount@hostname.com", "User name:", and "Password:". Below the "Password:" field is a checkbox labeled "Store login information". A "Login" button is located below the checkbox. At the bottom of the dialog, there is a blue bar with a red-bordered button labeled "Activate a new account".

4. Click on **Browse...**, select the activation file (**.iadc file**), and then click on **Next**.

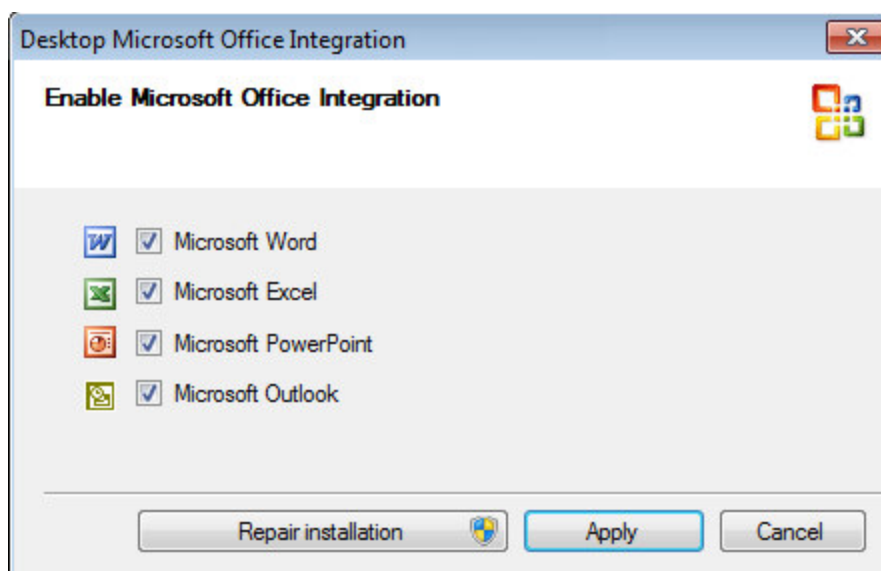


The screenshot shows a Windows-style dialog box titled "Activation of your account". It has a white background. Below the title, it says "Activation of your account". There is a text input field with a placeholder text "Enter the activation file name (e.g., MyAccount@hostname.com.iadc)". To the right of the input field is a "Browse..." button. Below the input field, it says "Press Next to connect with 'MyAccount@hostname.com'". At the bottom of the dialog, there are three buttons: "Back", "Next", and "Cancel". A key icon is located on the right side of the dialog.

5. Set a new password for your user account and click on **OK**.



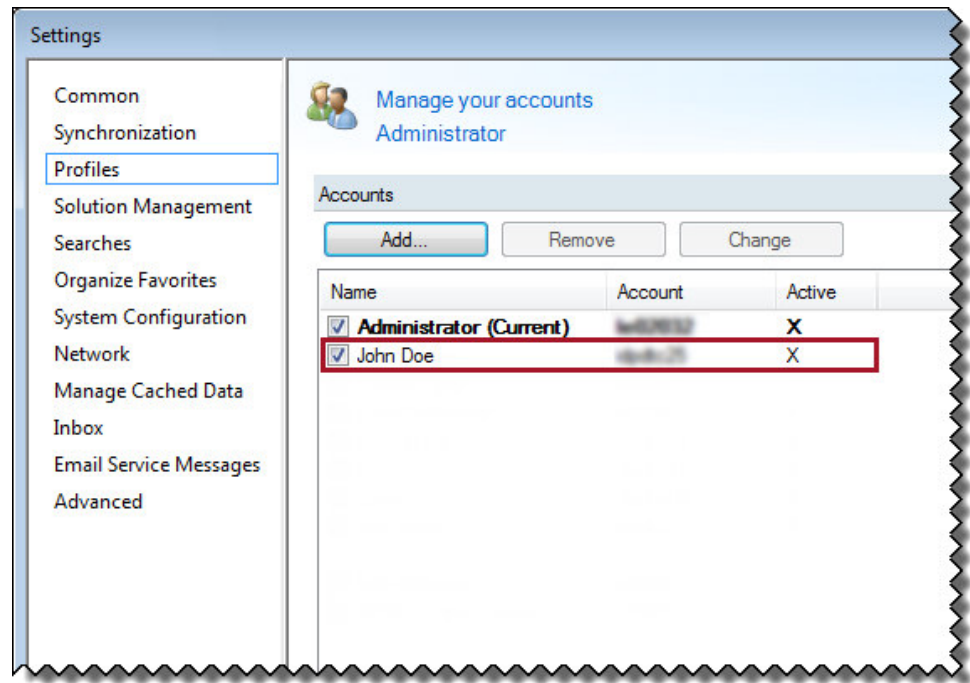
6. Enable/disable the various Office integration options as necessary and click on **Apply**.



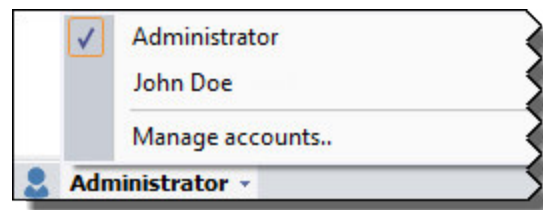
doculife Desktop will be prepared.

As soon as the process is complete, doculife Desktop will launch. Once it does, you can start working.

7. The new account will be shown in the account overview together with the user account that you already had.



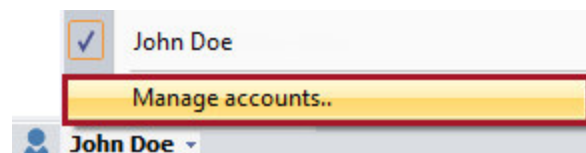
8. Close the Settings window by clicking on **OK**.
9. You can use the desktop status bar to select the new user account and connect to it.



## 5.2 Changing the display name for your user account

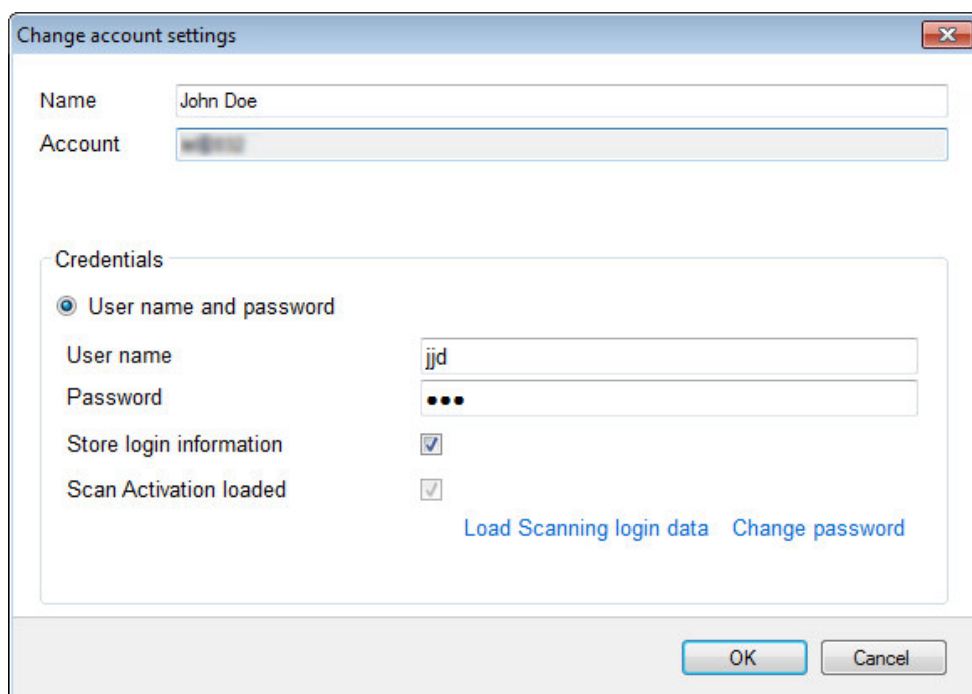
Once doculife Desktop is activated, the status bar will show the display name for the user account. This display name is set automatically by the activation file and can be changed by the user who owns the account.

1. Select the **Manage accounts..** option in the doculife Desktop status bar.



2. Select your user account and click on **Change**.

3. In the **Name** field, change the display name for the user account. Then click on **OK**.



The screenshot shows a 'Change account settings' dialog box. At the top, there is a title bar with the text 'Change account settings' and a close button. Below the title bar, there are two input fields: 'Name' with the text 'John Doe' and 'Account' with a blurred text. Below these fields is a section titled 'Credentials'. Inside this section, there is a radio button selected for 'User name and password'. Below this, there are two input fields: 'User name' with the text 'jjd' and 'Password' with three dots. Below these fields, there are two checkboxes: 'Store login information' and 'Scan Activation loaded', both of which are checked. At the bottom of the 'Credentials' section, there are two links: 'Load Scanning login data' and 'Change password'. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'.

4. Close the window by clicking on **OK**.





## OUR CONTACT DATA:

Please call us.

Monday till Friday 9:00 a.m. – 5:00 p.m.

+49 351 4188 5841

Or write us to [doculife-support@mms-support.de](mailto:doculife-support@mms-support.de)

**T · · Systems ·**